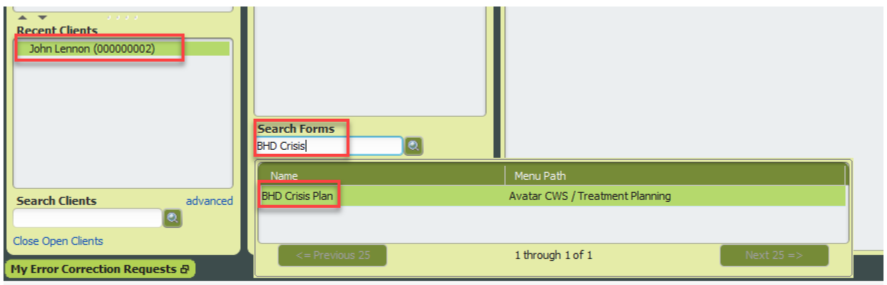
myAvatar™

Tips and Tricks

BHD Crisis Plan

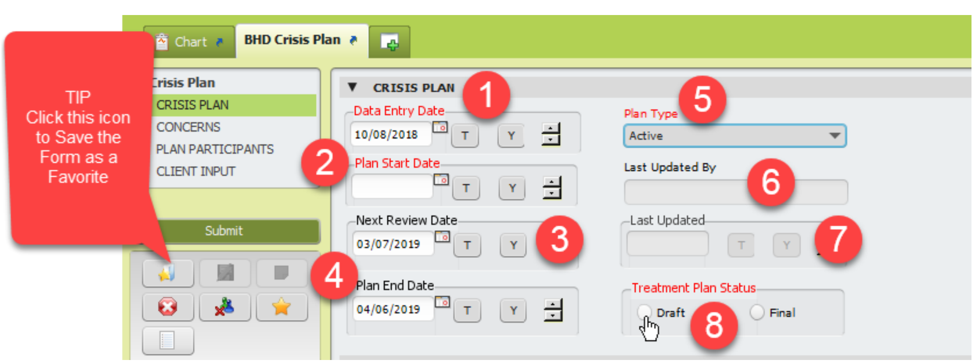
From the Home Screen, search for and select the client. With the client selected, enter BHD Crisis in the Search Forms box. Double-click to select the BHD Crisis Plan.



For a new client/plan, the form opens upon selecting the form (above).

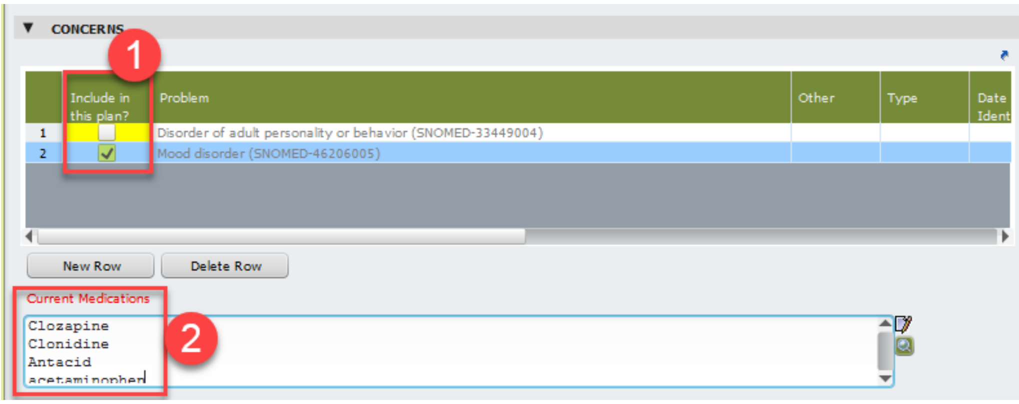
Red, <u>required</u> fields must be completed before the form can be finalized. Items in <u>black are not mandatory</u> to complete. **<u>However, always check with your Supervisor for individual program requirements.</u>**

1. **Data Entry Date**: mandatory field- the date you start data entry on the form. This will ususally be 'Today's Date'. (TIP – cannot be changed once submitted).
2. **Plan Start Date**: mandatory field- the date the Crisis Plan actually starts.
3. **Next Review Date**: mandatory field- set for 5 months after the Plan Start Date.
4. **Plan End Date**: mandatory field - set for 6 months after the Plan Start Date.
5. **Plan Type**: mandatory field- select Active for the initial plan and any subsequent updates.
6. **Last Updated By**: this will be filled in electronically after you "submit" the plan, naming the last person who opened this plan.
7. **Last Updated**: the date that the last person listed, opened the form.
8. **Treatment Plan Status**: mandatory field- should be Draft while making edits. Electronic signatures cannot be obtained until the Status is listed as Final.



Concerns:

1. Select each concern (problem) listed that should be <u>included in the plan</u>. Every concern you select will appear when the plan is launched. You must have at least one intervention for each concern included in the plan. (*See below for additional information on this section).
2. Enter the client's current medications.

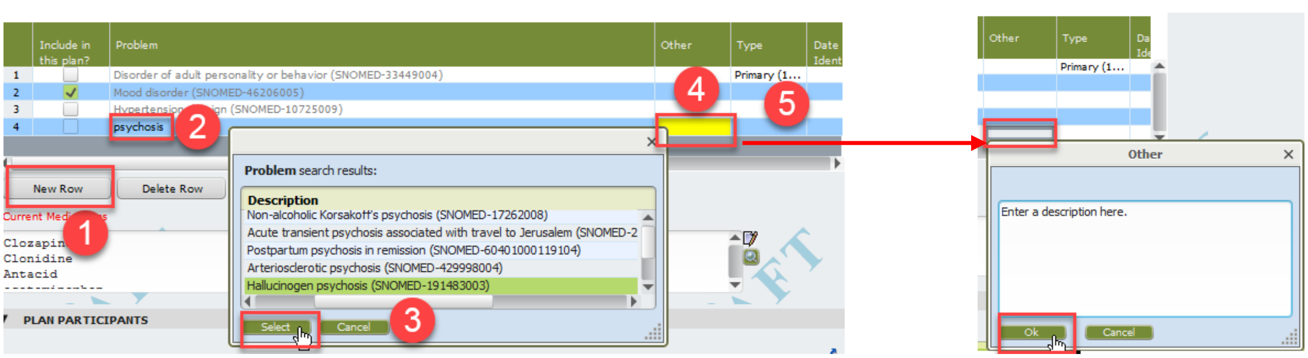


* The '*Concerns*' section is populated from the Avatar Problem List. Additional concerns/problems can be added using the forms/steps below.

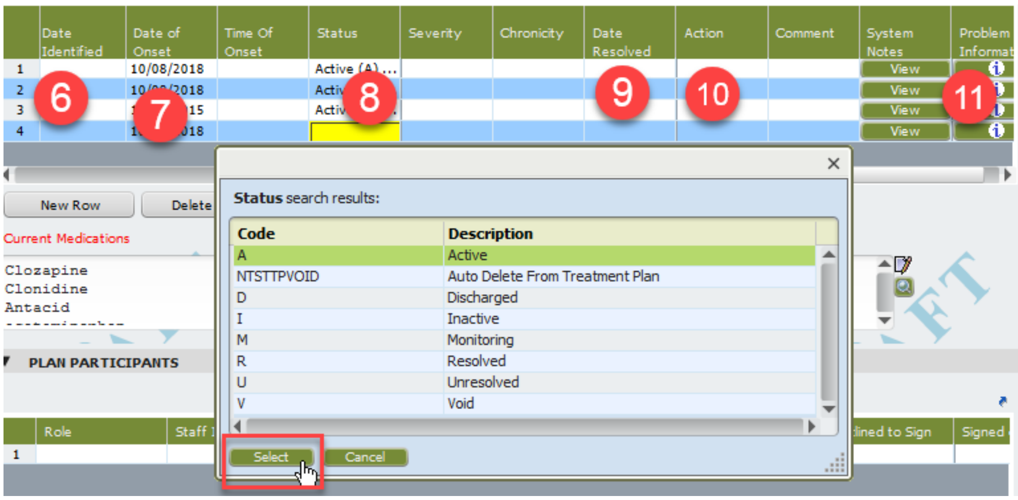
1. Complete the Diagnosis Form and select **Yes**, to '*Add to Problem List*' at the bottom of the form.
2. Complete the Problem List Form.
3. Add a new row to the grid in the Concerns section.

To add a new row to the grid, use the steps below:

1. Select **New Row**.
2. **Problem-** mandatory field- click in the Problem field and enter a problem/diagnosis. Click Enter.
3. In the Search Results box scroll down to find the appropriate problem. Click Select.
4. **Other-** if you can't find a specific type of problem, use *Specify Other* for the Problem in #2 and enter a description in the **Other** text box. Click Ok.
5. **Type-** select the type of problem, Primary or Secondary. This is not required, but is populated when completing the Diagnosis Form in Avatar.

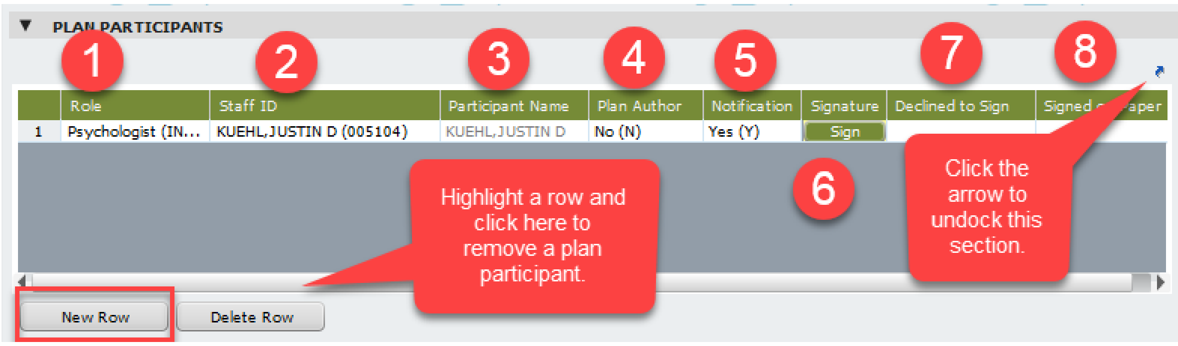


6. **Date identified-** indicate the date the problem was identified, as needed.
7. **Date of Onset-** mandatory field- indicate when the problem started. If the onset date is unknown, use the episode admission date.
8. **Status-** mandatory field- select an appropriate value from the drop-down list and click Select. Usually this is set to Active. If you Resolve a problem, indicate the date in column 9.
9. **Date Resolved-** enter the date the problem is identified as resolved. (See #8 above)
10. **Action-** for all Active problems, enter '*Treating*' in this field. For other problems not included in the plan, enter a reason why the problem is not included in the plan.
11. **Problem Information-** this is an embedded link to Medline Plus, a website for additional health information.



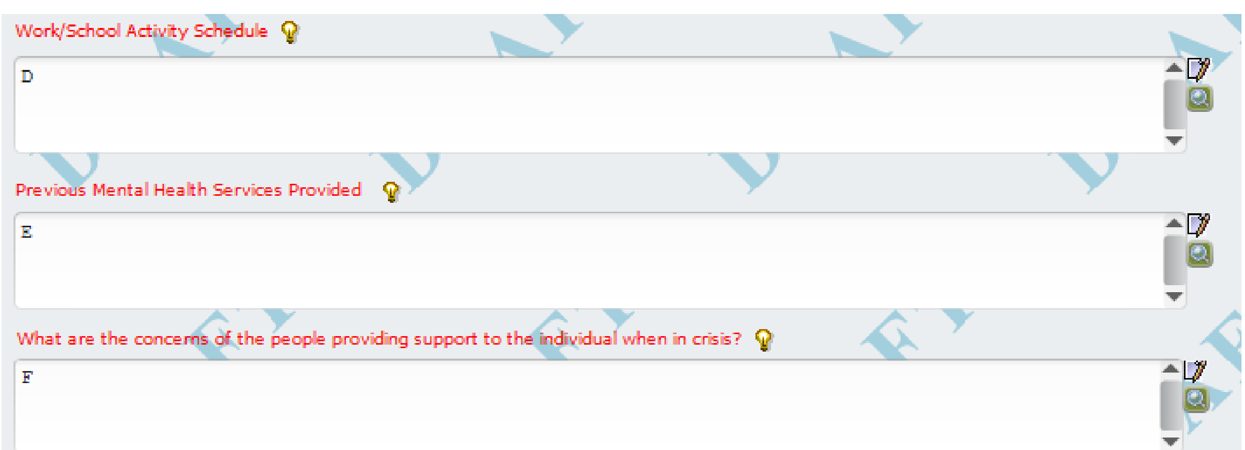
Plan Participants – click New Row

1. **Role-** mandatory field- the role of the participant (i.e. Case Manager).
2. **Staff ID-** depending on which role you chose, this field will either be required, or not. If you chose a role that refers to a person who has access to Avatar, then this field will be mandatory. When you start entering a name, (press tab), the provider's name will appear for you to choose it. If you've chosen a role that does not have access to Avatar, then you cannot type in this field. *(Ext) will jump to Participant name.
3. **Participant Name-** will pre-populate if Staff ID was entered. If you were not able to choose a Staff ID, then you will need to enter the participant name in the text box.
4. **Plan Author-** mandatory field - there can only be one Plan Author. This yes or no field answers the question, "Is the person in this role the Plan Author" (person completing the Crisis Plan)?
5. **Notification-** mandatory field – This yes or no field answers the question, "Is the person in this role a team member with access to Avatar that will review the plan at the next review date"?
6. **Signature-** all non-Avatar users will sign using the electronic signature pad. Members of the team will electronically approve, but only after the plan has been designated as final.
7. **Declined to Sign-** only check this box on the consumers row and only if the consumer declined to sign.
8. **Signed on Paper-** last resort option if signature pad is not working. If used, the signature/plan will need to be scanned into Avatar.



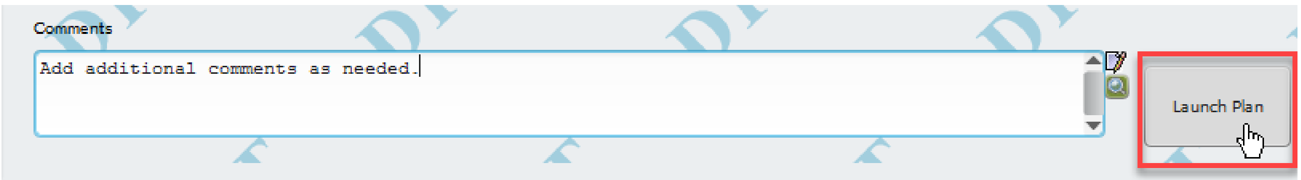
Client Input

A. **Strengths** can be identified as skills, characteristics, attributes, interests, cultural influences, experiences, activities, environmental factors, natural supports, previous successful strategies that lend to success in life and are valued by the consumer. Strengths can be self-identified or identified by others.
B. **Barriers/Needs** may include the consumer's symptoms, behaviors, functional skill deficits, and resource needs that have a negative impact on a consumer achieving their life vision. What are a consumer's challenges/needs because of their mental health and/or drug use? They can be self-identified or identified by other team members.
C. **Present Coping Skills** are the actions or reactions that a person may demonstrate or manifest when dealing with life stressors whether self-identified or identified by treatment team. (Examples of positive coping skills include physical exercise, taking a walk, taking a hot shower, calling the crisis line, meditating, calling a sponsor, etc.).



D. **Work/School Activity** would include the person's typical daily schedule, i.e. attends school daily, volunteers at St. Ben's, attends day program at Our Space, etc.
E. **Previous Mental Health Services Provided** would include a list of any mental health services the individual has participated in that they are no longer involved with (would include previous case management services, psychiatry, therapy etc.).
F. **What are the concerns of the people providing support to the individual when in crisis?** This would include input from other participants on the plan.

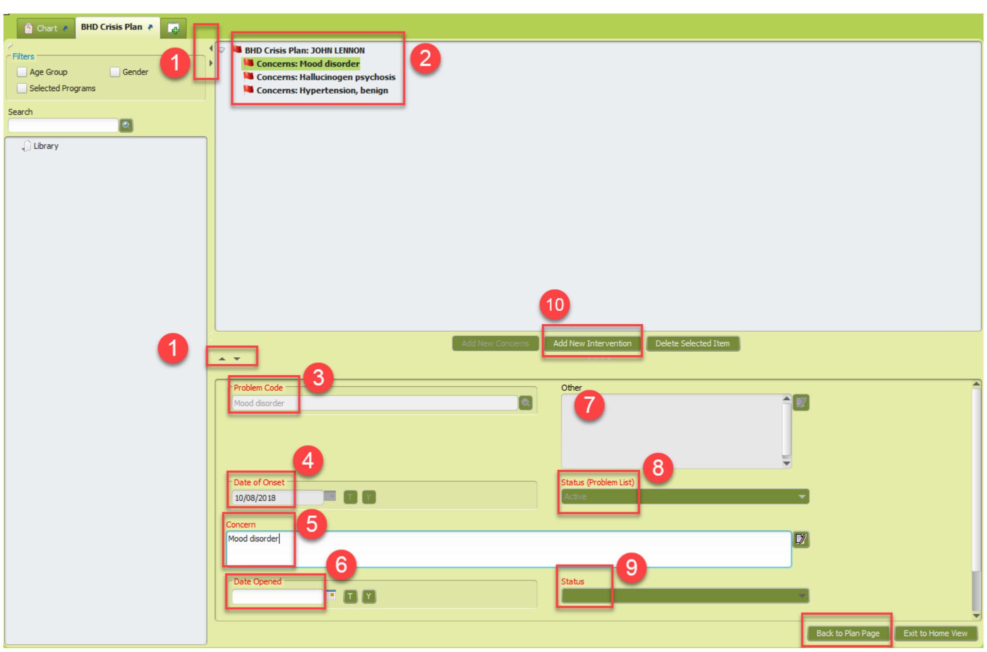
Add additional Client input comments as needed and click **Launch Plan.**



Launch Plan Page

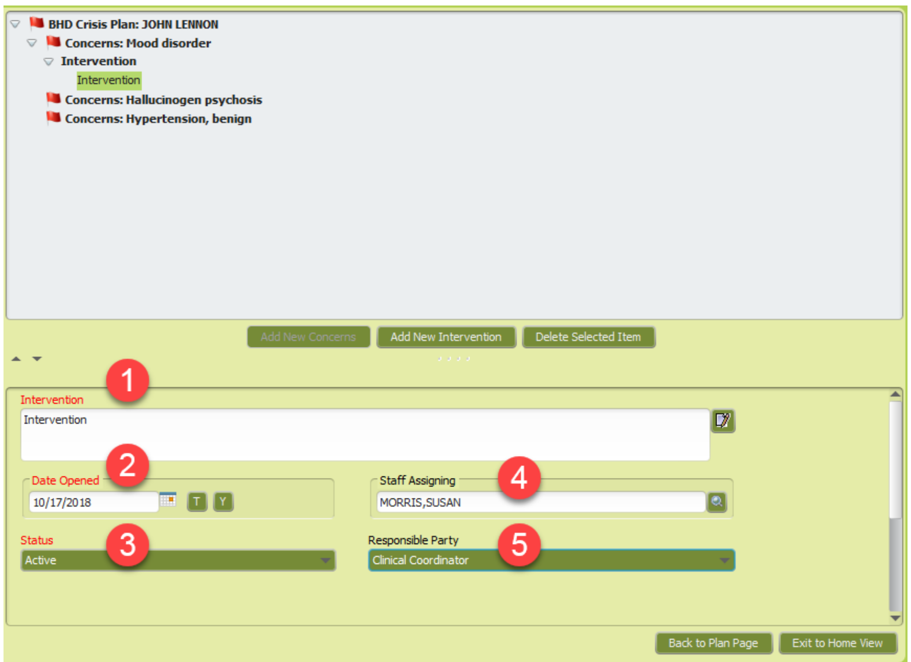
Use this section of the plan to address planned interventions for each Concern/Problem checked on page 1 as, Included in the plan.

1. Use the arrows to expand/collapse sections of the page for easier viewing.
2. Each concern checked (from plan page 1) as 'Included in the Plan' is listed. Select the first concern listed.
3. **Problem Code**- mandatory field - this pre-populates from plan page 1.
4. **Date of Onset**- mandatory field - this pre-populates from plan page 1.
5. **Concern**- mandatory field - this pre-populates from plan page 1.
6. **Date Opened**- mandatory field – (Start Date) should correspond to the first time this specific concern is listed in the Crisis Plan.
7. **Other** – list other problem related information here.
8. **Status (Problem List) -** mandatory field - this pre-populates from page 1.
9. **Status** – mandatory field – Active or Resolved. The problem should be Active until it is completed and then select Resolved. Once the problem is Resolved, all related interventions should be removed.
10. **Add New Intervention** – with the Concern selected (highlighted) click *Add New Intervention.*



Interventions

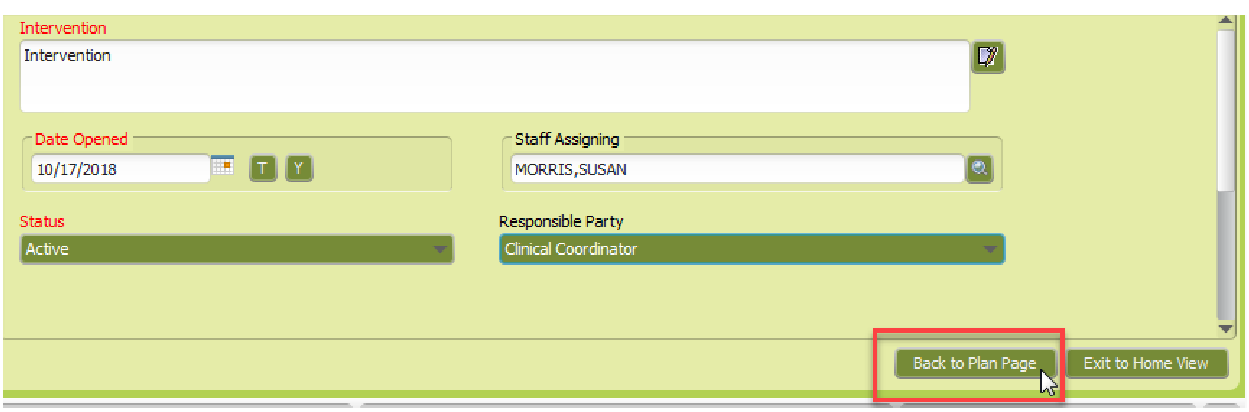
1. **Intervention-** mandatory field – enter the intervention here.
2. **Date Opened** (Start Date)- mandatory field – this is the date the intervention started. It needs to match the 'start date' or 'updated date' of the plan.
3. **Status-** Active or Resolved- mandatory field – the status should be Active until the intervention is completed and then choose Resolved.
4. **Staff Assigning-** this pre-populates with the author's name.
5. **Responsible Party-** choose the appropriate option from the drop-down menu.



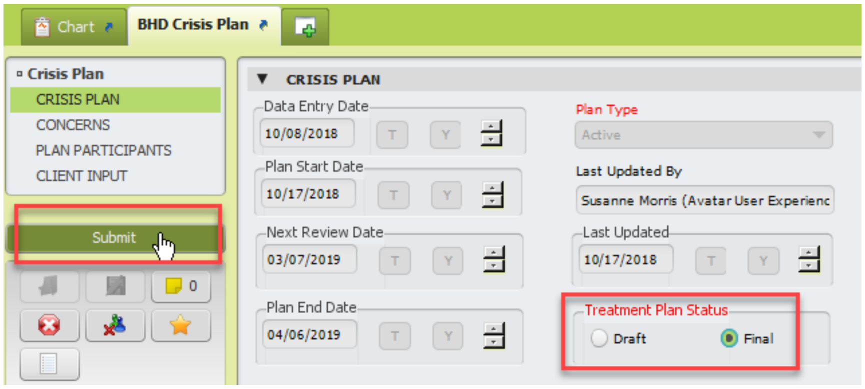
Each Concern listed in the plan will have a corresponding Intervention. Select the Concern and *click Add New Intervention,* and repeat the steps above for each Concern.

Move Plan to Final

The plan can be saved as draft until it is complete and ready for finalization. Once the plan is completed, it can be moved to Final status. Select the Back to Plan Page button to save the plan as draft or move it to Final.

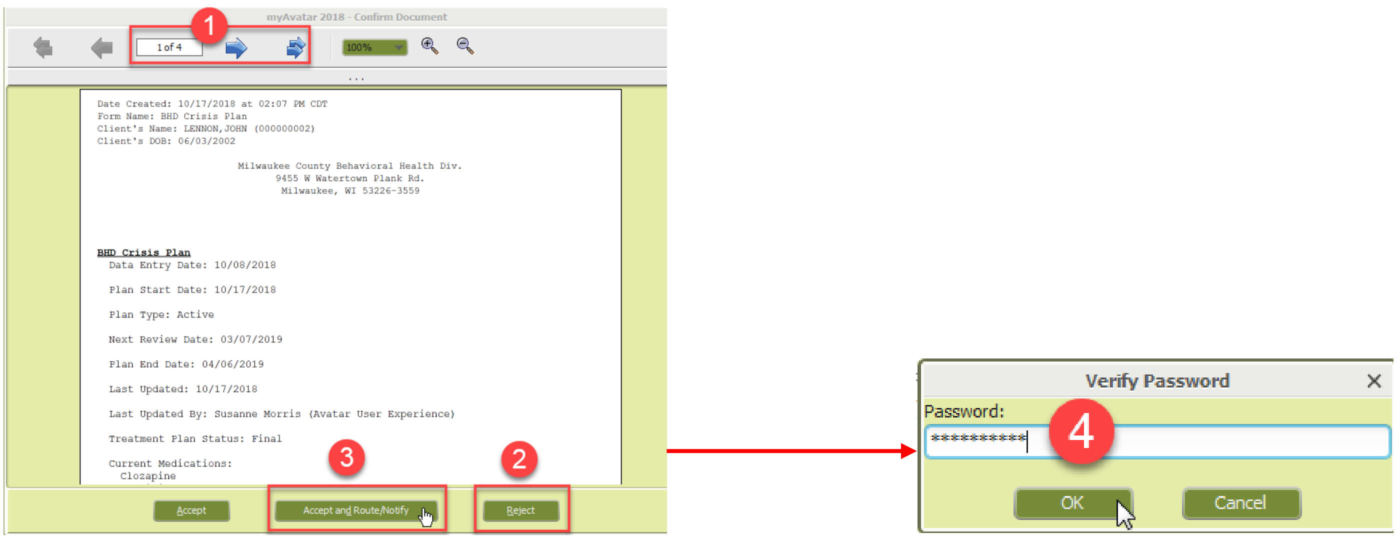


To move the plan to final, from Plan Page 1, select Final. Click Submit.

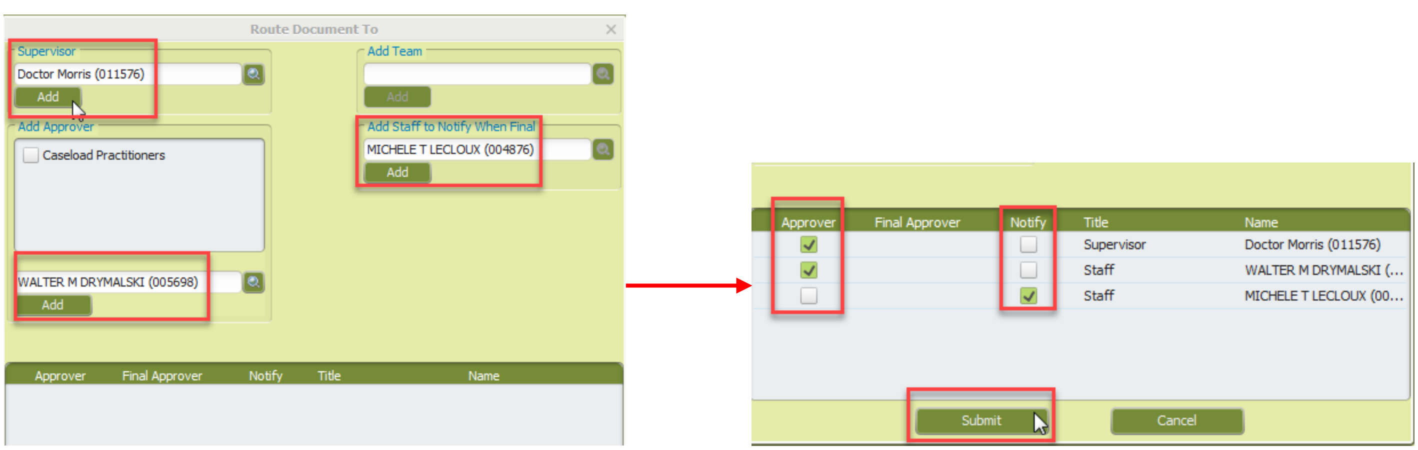


A 'tiff' image of the document is presented. Carefully review the document for errors and completeness.

1. Use the arrow keys to page forward through the document.
2. If you find an error or need to add something, click *Reject*. Move the document back to Draft status, make corrections, and resubmit.
3. Once satisfied with the document, click *Accept and Route/Notify* to route for Supervisor approval.
4. Enter your password. This is your electronic signature.



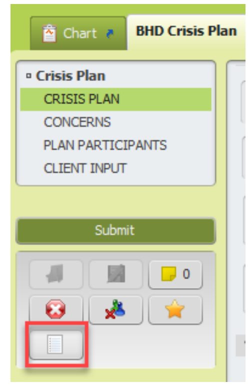
Depending on Program policy, search for and add Supervisor, Approver, or others to Notify. This includes any plan participant with Avatar access that needs to sign the plan. Click *Add* for each group. Verify that a check mark appears for each person that needs to approve or needs to be notified. Click *Submit*.



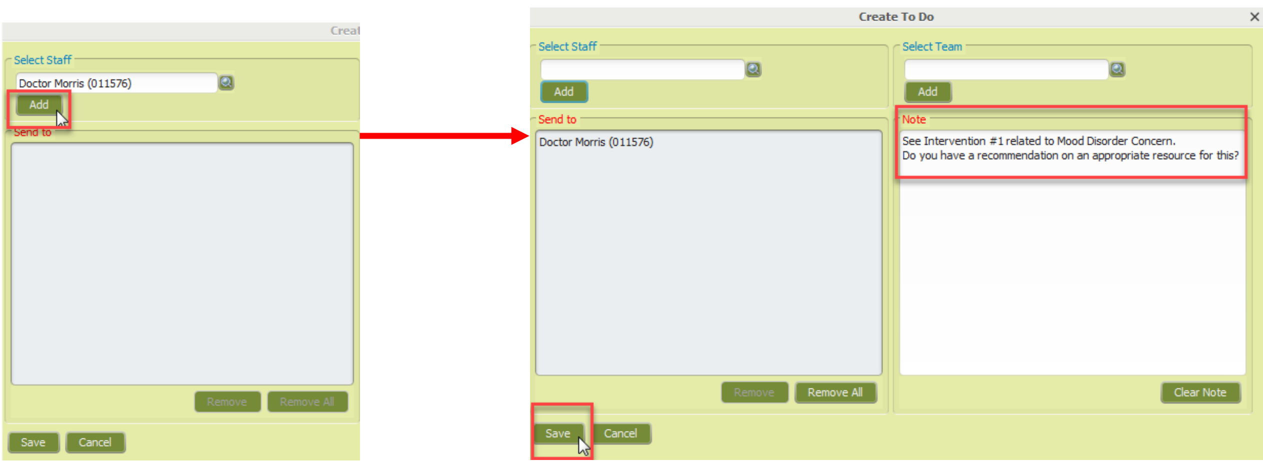
Create a To Do Message to send to a Colleague

While <u>not required</u>, this functionality allows the user to send a message to a colleague prior to submitting a final Crisis Plan. Whether you require more information about client concerns or have a question about an intervention, the tool allows you to communicate with another within the context of the plan itself.

Click the icon below the red X to open a new 'Create To Do' message.

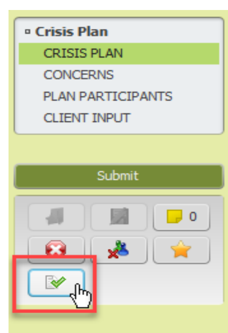


Select a user to send the message to and click *Add*. Enter the note and click *Save*.



The icon is now checked indicating the note has been sent.

Submit the form as needed.



The staff member you sent the message to recieves a 'To Do' item with the comments.